

Message Text

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USDOC WASHDC
AMCONSUL ZAGREB
AMCONSUL MILAN

UNCLAS SECTION 1 OF 4 BELGRADE 5146

MILAN FOR TRADE CENTER

EO 11652: NA
TAGS: BEXP, YO
SUBJ: COUNTRY COMMERCIAL PROGRAM - PRELIMINARY CONTRIBUTION FOR
FY-1980

REF: STATE 2688

1. THERE FOLLOWS FY 1980 CCP PRELIMINARY CONTRIBUTIONS
REQUESTED IN REFTEL. SECTION (1) OVERVIEW WILL BE SUBMITTED
WHEN EMBASSY PROVIDES DEATEILED DRAFT OF FY-1980 CCP SOME TIME
EARLY IN CY 1979.

2. WE RECOGNIZE THIS PROPOSED PROGRAM IS AMBITIOUS, THAT
COMMERCE AND MILAN TRADE CENTER MAY NOT BE ABLE TO PROVIDE
ALL THE SUPPORT REQUIRED AND THAT SOME OF THE SUGGESTED
CAMPAIGNS AND EVENTS MAY HAVE TO BE AMENDED OR DROPPED.
NEVERTHELESS WE SEE GREAT POSSIBILITIES FOR THE YUGOSLAV
MARKET IN A NUMBER OF AREAS AND BELIEVE IT WORTHWHILE TO
SPELL OUT IN DETAIL WHAT WE BELIEVE OUR OPTIMUM FY-1980 CCP
SHOULD INCLUDE.

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CAMPAIGN NO 1 PRIORITY RANK 2

CAMPAIGN TITLE: ELECTRONIC PRODUCTS
OBJECTIVE RATIONALE: INVESTING LITTLE OF ITS OWN FUNDS IN
INDIGENEOUS RESEARCH, THE YUGOSLAV DOMESTIC ELECTRONICS
INDUSTRY DEPENDS HEAVILY ON FOREIGN LICENSES FOR NEW TECH-
NOLOGY AND MODERN PRODUCTION PROCESSES. HOWEVER, LICENSED

PRODUCTION OFFERS ONLY A NARROW PRODUCT SELECTION AND CONSUMERS HAVE HAD TO OBTAIN MANY ELECTRONIC PRODUCTS FROM FOREIGN SUPPLIERS. US EDP MANUFACTURERS HAVE PERFORMED WELL OVER THE YEARS AND US MANUFACTURERS OF ELECTRONIC INSTRUMENTS PRESENTLY HOLD A 20 PERCENT SHARE OF THE MARKET. THIS SHARE IS RELATIVELY SMALL GIVEN THE US TECHNOLOGICAL LEAD IN THIS FIELD AND THE RELATIVE EASE WITH WHICH ELECTRONIC PRODUCTS CAN BE PROMOTED. MOREOVER, COMPETITORS FROM OTHER COUNTRIES (ESPECIALLY EEC COUNTRIES) ARE RAPIDLY INCREASING THEIR MARKET SHARE IN SOME PRODUCT LINES DUE TO THE LACK OF A SUSTAINED SALES EFFORT ON THE PART OF US FIRMS. US-MADE ELECTRONIC COMPONENTS AND ELECTRONIC PROCESS CONTROLS SHOULD FIND A READY MARKET IN SEVERAL SOPHISTICATED INDUSTRIES (CHEMICALS AND PETROCHEMICALS, OIL AND GAS PIPELINES, ENERGY SYSTEMS). ALTHOUGH THERE ARE ONLY HALF A DOZEN MANUFACTURERS OF ELECTRONIC PRODUCTS IN YUGOSLAVIA, ELECTRONIC INDUSTRY PRODUCTION AND TEST EQUIPMENT ARE ALSO IN GREAT DEMAND (SEE GLOBAL MARKET SURVEY ON EIPT EQUIPMENT). WORD PROCESSING EQUIPMENT, IF STRONGLY PROMOTED, ALSO MAY FIND A GOOD MARKET IN YUGOSLAVIA. ALTHOUGH ELECTRIC TYPEWRITERS ARE STILL A NOVELTY IN SOME OFFICES, THERE ARE MANY LARGE AND SOPHISTICATED ENTERPRISES THAT COULD PUT THIS KIND OF EQUIPMENT TO EFFICIENT USE. PROMOTIONAL EFFORT OF US FIRMS AT THIS TIME SHOULD BE AIMED AT GENERATING INTEREST IN NEW OFFICE SYSTEMS AND, IN EFFECT, CREATING DEMANDING UNCLASSIFIED

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FOR A PRODUCT LINE NEW TO YUGOSLAVIA. FOR THE PROMOTION OF ELECTRONIC PRODUCTS AND RELATED EQUIPMENT (E.G. COMPONENTS, EDP EQUIPMENT AND TESTING AND PRODUCTION EQUIPMENT), POST RECOMMENDS A USDOC SUPPORTED EXHIBITION AT THE MODERN ELECTRONICS FAIR, LJUBLJANA, IN OCTOBER 1979. POST ALSO SUGGESTS A MINI EXHIBITION OF WORD PROCESSING EQUIPMENT AS PART OF THE OVERALL US EXHIBITION AT THE ZAGREB FALL FAIR IN SEPTEMBER 1980. (BEFORE US FIRMS GEAR UP THEIR SALES PROMOTION EFFORTS OR PREPARE THEIR DISPLAYS FOR YUGOSLAV TRADE SHOWS, THEY SHOULD FAMILIARIZE THEMSELVES WITH THOSE ELECTRONIC PRODUCTS AND RELATED EQUIPMENT WHICH ARE SUBJECT TO US EXPORT CONTROL AND REQUIRE EXPORT LICENSE PRIOR TO SALE TO YUGOSLAV END USERS.)

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USDOC WASHDC
AMCONSUL ZAGREB
AMCONSUL MILAN

UNCLAS SECTION 2 OF 4 BELGRADE 5146

CAMPAIGN NO 2 PRIORITY RANK 3

CAMPAIGN TITLE: METAL PROCESSING EQUIPMENT
(INCLUDING METAL WORKING EQUIPMENT AND MACHINE TOOLS)
OBJECTIVE/RATIONALE: EXPANSION OF THE METAL PROCESSING
INDUSTRY IS A PRIORITY GOAL IN THE 1976-80 ECONOMIC PLAN
AND WILL LIKELY BE SO DESIGNATED IN THE SUBSEQUENT 5 YEAR
PLAN. BY 1980 ANNUAL IMPORTS OF PRIMARY METALS PROCESSING
EQUIPMENT ARE EXPECTED TO REACH 200 MILLION DOLLARS.
DOWNSTREAM FROM METAL PROCESSING, METAL FABRICATION INDUSTRIES
ARE UNDERGOING A MAJOR EXPANSION WHICH SHOULD CONTINUE INTO
THE 1980'S. THE MARKET FOR IMPORTED METALWORKING EQUIPMENT,
INCLUDING MACHING TOOLS, IS EXPECTED TO GROW TO 150 MILLION
DOLLARS ANNUALLY IN 1980. CAMPAIGN ACTIONS ARE AIMED AT
INCREASING THE US SHARE OF BOTH MARKETS BUT PARTICULARLY
OF MACHINE TOOLS WHICH HAS TRADITIONALLY BEEN DOMINATED BY
WEST EUROPEAN SUPPLIERS. THE HIGHLIGHT OF THE CAMPAIGN WILL
BE A USDOC/NMBTA SPONSORED EXHIBITION OF MACHINE TOOL
MANUFACTURERS TO BE HELD AT THE BIAM EXHIBITION IN JUNE 1980.
CAMPAIGN ACTIONS WILL PROVIDE FOLLOW THROUGH TO EFFORTS IN
THIS SAME AREA INITIATED IN FY-1979 CAMPAIGN.

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CAMPAIGN NO 3 PRIORITY RANK 4

CAMPAIGN TITLE: PLASTICS MAKING AND PROCESSING EQUIPMENT
OBJECTIVE/RATIONALE: THE CURRENT FIVE YEAR (1976-80)
ECONOMIC PLAN CALLS FOR RAPID EXPANSION OF THE PETROCHEMICAL
INDUSTRY. ONE OF THE INDUSTRY'S MAIN GOALS IS TO INCREASE
THE PRODUCTION OF REFINED AND PROCESSED PETROCHEMICAL

PRODUCTS FOR SALE IN THE RAPIDLY EXPANDING DOMESTIC MARKET AND FOR EXPORT. SEVERAL PROJECTS IN THIS AREA ARE NOW NEARING COMPLETION AND OTHERS WILL COME ON STREAM IN 1980-83. YUGOSLAVIA WILL THEN HAVE A GREATER SUPPLY OF FEED STOCKS FOR THE EXPANSION OF THE PLASTICS MAKING INDUSTRY. SUBSTANTIAL NEW PLANT CONSTRUCTION AND EXPANSION IS EXPECTED IN 1982-85. IN FY-80 AND THEREAFTER, US SUPPLIERS OF PLASTICS MAKING AND PROCESSING EQUIPMENT SOULD BE INTENSIFYING THEIR SALES PROMOTION EFFORTS. WE SUGGEST A TECHNICAL SALES SEMINAR TO COVER THIS THEME. IN ORDER TO EFFECTIVELY APPEAL TO A HIGH LEVEL AUDIENCE, THE SEMINAR SHOULD OFFCER SOUND TECHNICAL PRESENTATIONS ON THE STATE OF THE ART IN US INDUSTRY AND SHOULD FEATURE WELL ESTABLISHED RATHER THAN NEW TO MARKET FIRMS.

CAMPAIGN NO 4 PRIORITY RANK 5

CAMPAIGN TITLE: MAJOR PROJECT/PRODUCT OPPORTUNITIES
OBJECTIVE/RATIONALE: UNDER YUGOSLAVIA'S FIVE YEAR ECONOMIC PLAN (1976-1980), MAJOR INVESTMENTS ARE TARGETED FOR THE DEVELOPMENT OF ENERGY SYSTEMS, RAW MATERIALS PRODUCTION, LARGE SCALE INDUSTRIAL PROCESSING, EQUIPMENT MANUFACTURING AS WELL AS CONSUMER PRODUCTS INDUSTRIES. TO A SIGNIFICANT EXTENT, US EXPORT POTENTIAL DEPENDS ON THE ABILITY OF US FIRMS TO EXPLOIT MAJOR PROJECT AND PRODUCT OPPORTUNITIES IN THESE FIELDS. US FIRMS HAVE PARTICULARLY GOOD PROSPECTS
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IN PROJECTS IN MINING AND MINERALS PROCESSING, ELECTRICAL POWER GENERATION, PETROLEUM AND NATURAL GAS EXPLORATION AND EXTRACTION, CHEMICAL PROCESSING, FOOD PROCESSING, AND ELECTRONIC AND COMPUTER SYSTEMS. SALES OPPORTUNITIES INCLUDE TECHNOLOGY AND ENGINEERING SERVICES AS WELL AS EQUIPMENT. WITH THE INCREASE IN ACTIVITY OF YUGOSLAV ENGINEERING AND CONSTRUCTION ENTERPRISES ABROAD, ESPECIALLY IN DEVELOPING COUNTIRES, THERE ARE ALSO GOOD POSSIBILITIES FOR SALES IN THIRD COUNTRY MARKETS EITHER ON A SUBCONTRACTING OR JOINT VENTURE BASIS.

ACTIVITY NO 1 PRIORITY RANK 1

ANALYZING YUGOSLAV BUSINESS CONDITIONS FOR US FIRMS
DESCRIPTION/JUSTIFICATION: THIS ACTIVITY WILL FURNISH INFORMATION AND ANALYSIS FOR US GOVERNMENT AGENCIES, AMERICAN BUSINESSES AND THE US BANKING COMMUNITY ON THE UNIQUE YUGOSLAV ECONOMIC SYSTEM, PARTICULARLY AS IT APPEARS TO FOREIGN FIRMS.
THERE ARE FEW PRIVATE OUTSIDE SOURCES OF INFORMATION ON YUGOSLAVIA AND MOST US FIRMS DO NOT HAVE REPRESENTATIVE OFFICES WITHIN THE COUNTRY. THEREFORE US FIRMS RELY

ON ECONOMIC/COMMERCIAL PERSONNEL AS THEIR PRINCIPAL AND
SOMETIMES ONLY SOURCE OF INFORMATION ON DEVELOPMENTS.
SINCE CURRENT KNOWLEDGE OF YUGOSLAV BUSINESS CONDITIONS
IS ESSENTIAL TO A WIDE US AUDIENCE AND TO THE SUCCESSFUL
COMPLETION OF OUR TRADE PROMOTION ACTIVITIES, THIS EFFORT
SHOULD CONTINUE TO RECEIVE FIRST PRIORITY IN THE FY-1980 CCP.

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ACTIVITY NO 2 PRIORITY RANK 7

US EXHIBITION AT SEPTEMBER 1980 ZAGREB FALL FAIR
DESCRIPTION/JUSTIFICATION: THE ZAGREB FALL FAIR IS THE
OLDEST AND BEST ATTENDED OF YUGOSLAVIA'S MANY TRADE FAIRS.
AS SUCH IT IS AS EFFECTIVE VEHICLE FOR US FIRMS EITHER
TO ENTER THE YUGOSLAV MARKET OR MAKE THEIR PRESENCE BETTER
KNOWN. FOR MANY YEARS THE US HAS PARTICIPATED IN THE
FALL FAIR AND A SUBSTANTIAL US PRESENCE HAS BECOME
TRADITIONAL. SINCE 1977 US SPONSORED EXHIBITIONS HAVE
HAD AN ECONOMIC/COMMERCIAL FOCUS RATHER THAN THE PREVIOUS
"IMAGE SHOW" IMAGE. GIVEN THE GOOD STATE OF BILATERAL
POLITICAL RELATIONS AND THE MUTUAL DESIRE FOR EXPANDED
ECONOMIC RELATIONS, PARTICIPATION IN A US EXHIBITION
AT THE FALL FAIR OFFERS MANY ADVANTAGES TO US FIRMS.
THE OBJECTIVE OF THIS CAMPAIGN TO ORGANIZE THE LARGEST
AND MOST EFFECTIVE US EXHIBITION TO DATE.
THE EMBASSY AND CONGEN ZAGREB WITH ASSISTANCE FROM USDOC
AND THE INTERNATIONAL TRADE CENTER IN MILAN WILL ORGANIZE
THIS EVENT. MOST RECRUITMENT WILL BE HANDLED BY THE

EMBASSY/CONGEN. HOWEVER USDOC WOULD RECRUIT DIRECTLY
US FIRMS FOR A WORD PROCESSING AND EDITING SHOW WHICH
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WOULD FORM A PORTION OF THE EXHIBITION. THE WORD PROCESSING
AND EDITING SHOW WILL SUPPORT THE FY-1980 CAMPAIGN NO 1
(ELECTRONIC PRODUCTS) AND BE ONE OF THE ACTIONS INCLUDED
IN THIS CAMPAIGN.

ACTIVITY NO 3 PRIORITY RANK 8

US/YUGOSLAV ECONOMIC/COMMERCIAL WORKING GROUPS
RATIONALE/JUSTIFICATION: PURSUANT TO THE AGREEMENT
BETWEEN THE PRESIDENT AND PRESIDENT TITO OF YUGOSLAVIA
DURING THE LATTER'S XSIT TO WASHINGTON IN MARCH, 1978,
US YUGOSLAV ECONOMIC/COMMERCIAL WORKING GROUPS ARE BEING
FORMED. THE EMBASSY WILL HAVE A MAJOR ROLE IN THE
FUNCTIONING OF THESE GROUPS WHICH WILL SERVE TO FACILITATE
INCREASED TRADE AND ECONOMIC COOPERATION.

ACTIVITY NO 4 PRIORITY RANK 9

COMMERCIAL NEWSLETTER
DESCRIPTION/JUSTIFICATION: THE QUARTERLY COMMERCIAL NEWSLETTER
IS INTENDED TO STIMULATE INTEREST IN US PRODUCTS
AND TECHNOLOGY, INCLUDING AGRICULTURAL PRODUCTS, GIVE AN
UP TO DATE LISTING OF US STATESIDE AND OVERSEAS TRADE
EVENTS, PROVIDE INFORMATION ON US-YUGOSLAV COMMERCIAL AND
ECONOMIC DEVELOPMENTS AND MAINTAIN A FORUM FOR EXPLAINING
US TRADE AND ECONOMIC POLICY. THE VERY POSITIVE RECEPTION
TO THE NEWSLETTER AMONG YUGOSLAV BUSINESSMEN AND ECONOMIC
OFFICIALS IN ITS FIRST YEAR OF PUBLICATION INDICATES THAT
IT IS FILLING A VOID IN BUSINESS COMMUNICATION AND GENERATING
INTEREST IN US PRODUCTS AND SERVICES. THE CORE CONTENTS
OF THE PUBLICATION WILL CONTINUE TO BE DESCRIPTIONS OF NEW
PRODUCTS AND TECHNOLOGY TAKEN FROM COMMERCIAL NEWS USA
AND A FEATURE LENGTH ARTICLE ON US BUSINESS TRENDS SELECTED
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FROM AN AMERICAN BUSINESS PUBLICATION.

ACTIVITY NO 5 PRIORITY RANK 10

MEDICAL EQUIPMENT
DESCRIPTION/JUSTIFICATION: AS PER CAPITA INCOME RISES TO
THAT OF DEVELOPED COUNTRIES, YUGOSLAVIA'S INVESTMENT IN

SOPHISTICATED MEDICAL EQUIPMENT AND LABORATORY INSTRUMENTATION IS EXPECTED TO INCREASE SHARPLY. THE US TECHNOLOGICAL LEAD IN THIS FIELD PLACES US SUPPLIERS IN A FAVORABLE COMPETITIVE POSITION TO CAPTURE A LARGE SHARE OF THE IMPORT MARKET. TO HEIGHTEN US EXPOSURE, WHICH IS PRESENTLY AT A VERY LOW LEVEL, THE POST RECOMMENDS A TECHNICAL SALES SEMINAR ON A SPECIALIZED FIELD OF MEDICAL EQUIPMENT AND INSTRUMENTATION (E.G. LABORATORY TESTING, SURGERY, ANESTHESIA, ETC.). PRIOR TO THE SEMINAR, THE CONSULATE ZAGREB FY 78 MARKET RESEARCH REPORT ON MEDICAL EQUIPMENT WOULD BE UPDATED TO DETERMINE ITEMS FOR WHICH US FIRMS HAVE BEST SALES PROSPECTS.

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ACTIVITY NO 6 PRIORITY RANK 11

ENERGY SYSTEMS
DESCRIPTION/JUSTIFICATION: YUGOSLAVIA HAS EXTREMELY AMBITIOUS ENERGY DEVELOPMENT PLANS EXTENDING WELL INTO THE 1980'S. MUCH OF THE EQUIPMENT FOR NEW HYDRO, THERMAL AND NUCLEAR POWER PLANTS WILL HAVE TO BE IMPORTED. WHILE US FIRMS HAVE LANDED SOME IMPORTANT CONTRACTS IN THIS AREA, THE US SHARE OF THE IMPORT MARKET IS STILL RELATIVELY SMALL AND COULD BE SUBSTANTIALLY IMPROVED GIVEN THE QUALITY OF US EQUIPMENT AND TECHNOLOGY AND THE REVALUATION OF OTHER CURRENCIES AGAINST THE DOLLAR. AS A FOLLOW UP TO ENERGY EXHIBITS AT THE SEPTEMBER 1979 ZAGREB FALL FAIR A TECHNICAL SALES SEMINAR ON ENERGY SYSTEMS WOULD BE HELD IN MAY 1980.

ACTIVITY NO 7 IL PRIORITY RANK 12

SUPPORT THE ACTIVITIES OF THE US/YUGOSLAV ECONOMIC COUNCIL
(USYEC)

DESCRIPTION/JUSTIFICATION: THE EMBASSY WILL SUPPORT THE
ACTIVITIES OF THE NEW YORK BASED US-YUGOSLAV ECONOMIC
COUNCIL AND FACILITATE LIAISON WITH THE BELGRADE BASED
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COUNTERPART ORGANIZATION, THE YUGOSLAV CHAMBER FOR THE
PROMOTION OF ECONOMIC COOPERATION WITH THE UNITED STATES,
IN ORDER TO MAXIMIZE THE MULTIPLIER BENEFITS OF THESE
ORGANIZATIONS AND TO CONTRIBUTE TO THE GROWTH OF MUTUALLY
BENEFICIAL COMMERCIAL ACTIVITIES. EMBASSY SUPPORT OF
USYEC ACTIVITIES HELPS SHARPEN EMBASSY UNDERSTANDING OF
THE YUGOSLAV SCENE AND STRENGTHENS THE EMBASSY'S
CAPABILITIES IN SERVING US INDUSTRY THROUGH USDOC.
THE ANNUAL JOINT MEETING IN YUGOSLAVIA WHICH BRINGS
TOGETHER HIGH YUGOSLAV GOVERNMENT OFFICIALS AND REPRESENTATIVES
OF 60-80 US FIRMS IS THE SINGLE MOST IMPORTANT
SOURCE OF BUSINESS INFORMATION AND TRADE PROMOTION IN
OUR PROMOTIONAL PROGRAM. USYEC VIGOROUSLY SUPPORTS
USDOC'S EFFORTS TO ENCOURAGE NEW TO MARKET FIRMS TO
BECOME ACTIVE IN YUGOSLAVIA AND ASSISTS THE EMBASSY
AND THE CONSULATE GENERAL ZAGREB IN PUBLICIZING TRADE
AND INVESTMENT OPPORTUNITIES.
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